Installation Guide for

Direct Loan Tools for Windows

U.S. Department of Education

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Introduction

Preface

Direct Loan Tools for Windows (DL Tools) is a multi-cycle application designed to help you perform the following tasks:

- Rebuild loan and disbursement data in EDExpress using an automated process

- Compare the 732 report to actual disbursements recorded in EDExpress or an external file and compare to DL Tools Cash Database

- Print the 732 report in a readable format

- Track cash receipts (drawdowns) and returns of excess cash for Direct Loan

DL Tools processes data for multiple cycles. The initial release (Version 1.0) of DL Tools is for program years 2000-2001 and 2001-2002 and has the same "look" and "feel" of EDExpress. All Direct Loan Schools can use the Compare and Track cash detail functionality. The Rebuild process is for schools utilizing the EDExpress Direct Loan Module. It contains Rebuild and Cash Management functionality for the 2000-2001 and 2001-2002 cycles and Compare functionality for the 2001-2002 cycle. Functionality for subsequent cycles can be added in later versions.

Direct Loan Tools Features

Imports

You can import the following data files:

- Rebuild

  When selecting the Rebuild import type, you have three options to choose. You can perform these functions with the 2000-2001(EDExpress v6.x) and 2001-2002 (EDExpress v7.X) records:

  - Compare Only
  - Update All
  - Update Selected Records

- 732 Loan Detail and Cash Detail
- 732 Cash Summary
- Cash Detail External Add
- Loan Detail External Add

Reports

These reports are available in DL Tools. For some reports, you must have a connection to the Direct Loan database of EDExpress.

- Cash Summary
- Cash Detail Comparison (not available for 2000-2001)
- Loan Detail Comparison - Loan Level (not available for 2000-2001)
- 732 Cash Detail (not available for 2000-2001)
- 732 Loan Detail (not available for 2000-2001)
- Record Layout - DL Header
- Record Layout - DL Trailer
- Record Layout - Rebuild Origination
- Record Layout - Rebuild Disbursement
- Record Layout - 732 Cash Detail

- Record Layout - 732 Loan Detail
- Record Layout - Cash Summary
- Record Layout - Cash Detail External Add
- Record Layout - Loan Detail External Add

EDconn32

Important steps in processing financial aid information are sending and receiving data over the Student Aid Internet Gateway (SAIG).

To accomplish these steps, DL Tools works with the SAIG telecommunication product, EDconn32, formerly EDconnect. EDconn32 enables you to send and receive data over the SAIG.

See the *Student Aid Internet Gateway EDconnect Desk Reference* for EDconn32 software instructions.

Using This Installation Guide

Use the instructions contained in this Installation Guide to install the software on your computer or Local Area Network (LAN).

This guide also provides you with hardware and software requirements, how to estimate the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See the "Installation Instructions" section in this guide for additional installation instructions.

Help

Online Help

Instead of a paper user's guide, DL Tools has online Help.

General help is available from the menu bar and field help is available by pressing the F1 key.

See the topic "Using Help" in the online Help and the "Getting Help" section in this Installation Guide for more information.

CPS/WAN Technical Support

For questions regarding:

- technical assistance
- software functionality
- file layouts
- EDconn32 functionality

call CPS/WAN Technical Support at:

800/330-5947

TDD/TYY: 800/511-5806

See the topic "CPS/WAN Technical Support" in the online Help and this Installation Guide for more information.

System Requirements

Hardware and Software Requirements

The following hardware and software components are required for DL Tools:

- IBM or fully IBM-compatible PC with a Pentium 200 MHz processor or better.

- 64 MB total memory or more.

- 300 MB of available hard disk space (depending on the functions you use and how many records you store in your database).

- 56 K analog modem K flex or X2 technology.

- Dedicated phone line.

- 3.5"/1.44 MB high-density floppy disk drive, including 3.5" high-density double-sided diskettes.

- Windows 95 keyboard (for example, IBM Enhanced 101 or 102 Keyboard).

- Microsoft compatible mouse.

- Laser printer capable of printing on standard paper (8 ½" x 11").

- 32-bit operating system (Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.0).

- Monitor and video card capable of Super Video Graphics Adapter (SVGA) (800 x 600) resolution (small fonts only). DL Tools is designed in SVGA. You may use a higher resolution than SVGA at your own discretion.

- Internet Service Provider (ISP) or connection to the Internet. A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site, www.ifap.ed.gov, and the SFAdownload Web site, www.SFAdownload.ed.gov.

Optional Items to Consider

The following items are recommended as additional tools to assist you in managing your financial aid data:

- 12X CD-ROM drive with sound board for other future software distributions

- Backup system (for example, a tape backup system) to store your data

- Power supply backup or surge protectors

- Phone line surge protector

- Virus scan software

Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add together the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 Direct Loan, ISIR, NSLDS, and Packaging records using all of the software products listed is approximately 81 MB.

Each software product requires the following space:

Product	Size
DL Tools for Windows	5 MB
EDconn32 for Windows	15 MB
EDExpress for Windows	16 MB
FISAP for Windows	4 MB
Quality Analysis Tool for Windows with 300 records	4 MB
Renewal Applicatons for Windows	2 MB
Return of Title IV Funds for Windows	2 MB
SSCR-32 with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
Direct Loan	6 MB
ISIR	15 MB
NSLDS	4 MB
Packaging	2 MB

Local Area Network (LAN) Server Compatibility

LAN Server Compatibility

DL Tools can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x
- Microsoft Windows NT Server 4.x
- Windows 2000 Server

Caution: You should not run the software on peer-to-peer networks such as Artisoft LANtastic, Microsoft Windows for Workgroups, or Novell's Personal NetWare.

According to the Microsoft Knowledge Base, some anomalies have been known to occur when using Microsoft Access with the following networks: DEC Pathworks, IBM LAN Server, and Sun PC-NFS. Since DL Tools makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with DL Tools.

Note: Although Windows 2000 is supported, Access 2000 is NOT supported. Irreparable damage will be caused to your database if it is opened in Access 2000 and converted to the new version. The database is still designed for Access 97 only.

LAN Cautions

When multiple users are concurrently updating databases in the DL Tools database, those records are locked. Also certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The database is locked when the executing function is mass loading records, such as the Import function.

- Records are locked when an executing function needs stable data for updating or printing.

- Functions are locked when multiple executions of the functions would destroy the databases.

LAN Messages

Novell

These messages notify users when a locking situation occurs:

LAN Error Message

Condition

<Database> is locked and cannot be accessed at this time.

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

Record in use - Retry later.

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

Function in use - Retry later.

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

NT

Your NT server should be optimized to maximize throughput for file sharing.

To Maximize Throughput for File Sharing

1. At the server control panel, go to **Start**, **Settings**, **Control Panel**, **Network**.

2. On Network screen, choose the **Services** Tab.

3. Select **Server** from the list by double clicking on it.

4. Mark the **Maximize Throughput for File Sharing** radio button.

Both the location and the size of the paging files on the NT server are important to the functionality of the software. Paging files on the server should be generally higher than Microsoft recommends. If possible, move the paging files from the drive where the DL Tools software is located, even if it means putting them on the system drive.

If your NT server partition, where the database is located, is an NT File System (NTFS), remember that the directory path is case sensitive.

The financial aid group must own the folder, as well as all files in the database directory, on your NT server.

All users must have Change (to delete, create, execute, read, and write) or higher permissions to access both the DL Tools database and downloaded folder, as well as the files in each of those folders.

Additional LAN Instructions

If you are using a NetWare product, please enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running DL Tools in a LAN environment:

- IBM or fully IBM-compatible PC with a Pentium 200 MHz processor or better.

- 64 MB total memory or more on each workstation.

- 300 MB available hard disk space on the file server (depending on the number of records you will store in your database).

- *Desktop Operating System*: Microsoft Windows 95, Microsoft Windows 98, Microsoft Windows 2000, or Microsoft Windows NT 4.x.

- *Network Operating System*: Novell NetWare versions 3.12 or above or 4.11 or above, or Microsoft Windows NT 4.0.

  Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports.

- Monitor and video card capable of SVGA (800 x 600) resolution (small fonts only). DL Tools was designed in SVGA. You may use a higher resolution than SVGA at your own discretion.

Refer to the previous System Requirements section for a complete listing of the general hardware and software required for DL Tools.

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing DL Tools.

Instructions are provided for both single-user and network system installation.

Depending on the type of installation you are performing (single-user or network), not all installation diskette files (or diskettes) may be required.

Note: If you do not have access to the Internet to download the software or if you have trouble opening the SFAdownload Web site, call CPS/WAN Technical Support at 800/330-5947 or via e-mail at cpswan@ncs.com.

Other topics include:

- Downloading software and documentation from the SFAdownload Web site

- Creating the Install Log

- Changing the database path from the DL Tools software application

- Uninstalling the software

Directory Creation

The installation process automatically creates the directory,

C:\Program Files\EDESuite\DL Tools for Windows

for DL Tools files on your local hard disk.

The C: drive is assumed to be the drive letter of your local hard disk, but you can change the drive letter if necessary. Also, you may use a different name for the directory.

Caution*:* If you change the directory location and name, you must remember and use them with each DL Tools software update you receive.

Program Folder

The default program folder used in DL Tools is called EDESuite. You may also change this name.

SFAdownload

DL Tools is available on the SFAdownload Web site in two formats. You can download the entire software in one file, called DLTool10.exe, or you can download the software in separate installments, which can then be copied to a network drive or diskettes.

See the "Downloading Software/Paper Documentation" section for more details.

Note: If you do not have access to the Internet to download the software or if you have trouble opening the SFAdownload Web site, call CPS/WAN Technical Support at 800/330-5947 or via e-mail at cpswan@ncs.com.

Once the software download is complete, be sure all Windows applications, including screen-savers and e-mail notifiers, have been closed. Then follow the prompts provided by the software when installing DL Tools.

Installation Steps at a Glance

Step	Action	Reference
1	Download the software from the SFAdownload.ed.gov Web site.	Read "Downloading Software and Paper Documentation from the SFAdownload Web site" for instructions or request diskettes from CPS/WAN Technical Support.
2	Install the software.	Read "To Install the Software" for instructions.
3	Download all supporting paper documentation from the SFAdownload.ed.gov Web site.	Read "Downloading Paper Documentation from the Web" for instructions or request documents from CPS/WAN Technical Support.

Downloading Software and Paper Documentation from the SFAdownload Web Site

You can download both software and paper documents from the Internet using the SFAdownload Web site, **www.SFAdownload.ed.gov**.

The SFAdownload Web site was created to help you access financial aid tools (for example, software and paper documents) for easier and more efficient use of DL Tools.

Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have direct connection to the Internet, a 56 kb modem is recommended.

The table below shows the minimum possible download time for various file sizes and modem speeds. The actual times vary depending on the quality of the phone line and Internet traffic.

Modem Speed	1 Megabyte	5 Megabytes	10 Megabytes
9.6 kbs	18 min.	1 hour, 28 min.	2 hours, 58 min.
14.4 kbs	12 min.	59 min.	1 hour, 58 min.
28.8 kbs	6 min.	30 min.	59 min.
33.6 kbs	5 min.	25 min.	51 min.
56 kbs (53 kbs)	3 min.	16 min.	32 min.

Getting Help

Some organizations restrict their users from downloading from FTP sites.

- If you are having trouble downloading (for example, you are prompted for a user ID and Password or just can't download), try again later.

- If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

- If you do not have access to the Internet or have trouble opening the SFAdownload Web site, contact CPS/WAN Technical Support.

Downloading Software from the Web

DL Tools and its related documentation are distributed via the Internet using the Student Financial Assistance (SFA) Download Web site, **www.SFAdownload.ed.gov**. It is available on the SFAdownload Web site in two formats. You can download the entire software in one file (DLTool10.exe), or in separate installments, which can be copied to a network drive or diskettes.

To Download the Software as One File

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **www.SFAdownload.ed.gov**.

2. Click on **Software** button on the left-hand side of the screen.

3. Click **Direct Loan Tools 2001-2002** to the left of this description. You are taken to the download site.

4. Click the **Full Download** link to download the program that allows you to do the full installment. A **Save As…** dialog box appears.

5. Choose the location on your hard drive where you want to save the file, then press the **Save** button. The length of time it takes to download the software depends largely on the speed of your Internet connection.

6. Once the file is downloaded to your hard drive, go to that location and double click **DLTools.exe** to extract the file and install the software.

See "To Install the Software" for additional instructions.

To Download the Software in Separate Installments

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **www.SFAdownload.ed.gov**.

2. Click on **Software** button on the left-hand side of the screen.

3. Click **Direct Loan Tools 2001-2002** to the left of this description. You are taken to the download site.

4. Click **Disk 1**. At the **Save As…** dialog box, choose the location on your hard drive to save the file. Click **Save.**

   Note: The length of time the software takes to download depends on the speed of your Internet connection.

5. Click **Disk 2**. When the **Save As…** dialog box appears again, save **Disk 2** to the same location as you saved Disk 1.

6. Click each succeeding disk until they have all been saved to the same location on your hard disk.

7. Once the software disk files are downloaded to your hard disk, go to that location, double-click **Disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click on **Setup.exe** to install the software.

See "To Install the Software" for additional instructions.

To Install the Software

Downloading the software from the SFAdownload Web site does not install it. After downloading the software to your network or hard drive, you must install it.

Be sure all Windows applications, including screen-savers, and e-mail notifiers, are closed.

1. If you downloaded the DLTool10.exe file from the SFAdownload Web site, go to the location of that downloaded file. If you received installation diskettes in the mail from the U.S. Department of Education, see the "Installation Steps (Diskette)" section.

2. Double-click the file to open and/or install it. The file decompresses itself into a temporary directory (usually "c:\temp") and continues the install from there.

3. DL Tools asks you a series of questions during the installation. These questions verify the location of the software on your hard drive and each question has a default answer.

   Note: You must click **Yes** if you get a message asking if you'd like to overwrite a read-only file when installing the software.

   - If the default answer is correct, click **Next** to go to the next screen.

   - You can change the default answer, if you want. If you do, make sure you know the directory where the software is located.

4. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.

5. When the installation program is finished installing the files for DL Tools, it updates your Start menu. It does not, however, create desktop icons/shortcuts or update them if they have already been created. You are prompted to reboot the system to complete the installation.

See "Installing Direct Loan Tools on a Single-User System" and "Installing Direct Loan Tools on a Network" for more information.

Installing Subsequent Releases

When installing a subsequent release of the software, a process to update the database may be required. This process is required when it is an update to the previous version of the same year/cycle for this product. The update process occurs the first time that the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or network-based database.

Note: See "Installation Options" and "Subsequent Installations" for more information about installing subsequent releases.

Downloading Paper Documentation from the Web

You can download paper documentation from the Internet in either Adobe PDF or Microsoft Word format from the SFAdownload Web site located at **SFAdownload.ed.gov**. The following types of paper documentation are available to download from this Web site:

- Cover Letters
- Installation Guides
- Technical References

Each document has the date it was posted, file size, and approximate download time. However, the length of time it takes to download a paper document depends on the speed of your Internet connection.

To Download Paper Documentation

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **www.SFAdownload.ed.gov**.

2. Click on **References and Documentation** button on the left-hand side of the screen.

3. Click **Direct Loan Tools** to the left of this description. You are taken to the download site.

4. Click on the type of documentation you want to download: Adobe PDF or Microsoft Word.

   #### Adobe PDF

   If you select an Adobe PDF formatted file, click **File**, **Save As** from the menu bar, select a location on your hard disk, and then click the **Save** button to save the file.

   #### Microsoft Word

   If you select a Microsoft Word formatted file, a dialog box appears. Click on **Save it to disk**, choose a location to save the file, and press the **Save** button.

5. For either type of file, the Web site is designed to give it a default name; however, you may choose another name for the file.

6. Once the paper document has been downloaded on your hard disk, go to that location and double-click on the file to open and/or print it.

Installing Direct Loan Tools on a Single-User System

Installation Options

You can install the software using one of two options:

1. **Full**. Use this option when you are installing DL Tools for the first time and want all available DL Tools software modules installed.

   Warning for Subsequent Installations: Use caution when using the Full installation option. The program overwrites, removes, and erases your existing DL Tools database (dltools.mdb) and all program files including (DLTools.exe), as well as any annotations you may have made to Help.

2. **Custom**. Use a Custom installation in one of two ways.

   - If you have already installed a full version of DL Tools, you can use this option to add a particular file or files; for example, executable (*.exe) files, database (*.mdb) files, and help files (*.hlp). This option leaves all other database and system settings intact (unless you select *.mdb files).

   - To upgrade the software, choose Custom installation and select all files except your existing database files (*.mdb); for example, DL Tools V. 1.x. This is the Custom default selection.

Follow the prompts provided by the software when installing DL Tools.

Installation Steps (Diskette)

Be sure that all Windows applications, including screen-savers and e-mail notifiers are closed before you proceed with this setup.

To Install the Software on Your PC

1. Turn on your PC and start Microsoft Windows.

2. Insert Diskette #1 in the **a:** drive.

3. Select **Start** from the Task bar.

4. Select **Run** from the Start pop-up menu.

5. Type **a:\setup** at the Open entry field and click **OK**.

   The software is installed to the default directory **C:\Program Files\EDESuite\DL Tools for Windows**, unless you choose another location.

6. When prompted, insert each diskette in numerical order and click **OK**.

   DL Tools asks you a series of questions during the installation. Each question has a default answer.

   Note: You must click **Yes** if you get a message asking if you want to overwrite a read-only file when installing the software.

   If the default is correct, click **Next** in response to each question.

   Or

   If not, select the correct answer and click **Next**.

7. When the installation program is finished installing the files for DL Tools, it updates your Start menu. It does not, however, create desktop icons/shortcuts or update them if they have already been created. You are prompted to reboot the system to complete the installation.

Installing Subsequent Releases

When installing a subsequent release of the software, a process to update the database may be required. This process is required when it is an update to the previous version of the same year/cycle for this product. The update process occurs the first time that the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or network-based database.

Note: See "Installation Options" and "Subsequent Installations" for more information about installing subsequent releases.

Installing Direct Loan Tools on a Network

Follow the instructions in this section for installing the software on a network. In particular,

- If you are installing the initial DL Tools, do a full installation and follow the steps provided in the "First Time Installation" section.

- If you are installing DL Tools after you have created data in the database, follow the instructions provided in the "Subsequent Installation" section.

When you perform a workstation installation, the executable file for DL Tools (DLTools.exe) and all other program files are installed to a workstation's local hard drive.

The installation modifies all DL Tools program group icons in your Windows Start Menu folders to point to the executable file on your local hard drive.

Installing this file to the workstation's hard drive rather than the network file server improves the speed and performance of the software because DL Tools uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install DL Tools on local area networks.

Note: Be sure that all Windows applications, including screen-savers and e-mail notifiers are closed before you proceed with this setup.

First Time Installation

To Install the Software on a Network for the First Time

1. First, use the Network Server installation option to install only the DL Tools database (dltools.mdb) on the file server, not the DL Tools program files.

2. Enter the Network server location where you want to install DL Tools for Windows, Version 1.0 database files.

   Type the path or click the **Browse** button**.**

3. Follow the prompts provided by the **Setup** program.

4. Perform **Full workstation** installations on *all* workstations that will access the server based copy of the database for this version of the software**.**

   Choose the Network Workstation installation option, and then select **Full**.

   The Full option installs all program files, including the executable file (DLTools.exe) in a local hard drive directory.

   The Workstation installation option prompts you for the location of the database installed during the Network Server installation (step 2).

Additional Instructions

You are asked two location questions:

• The software first prompts you to enter the location of the database on the server. This question is asking only where your database is located, not where you want the software installed.

• After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\DL Tools for Windows,** or some other local designation.

Subsequent Installation

To Install the Software on a Network File Server Where the Software Is Already Installed

1. **Do not** use the Network Server installation option for this version of the software; for example, DL Tools V 1.x. The Network Server installation option is only for users installing DL Tools to a network file server for the first time. Choosing this installation option installs an empty dltools.mdb (DL Tools database file) on the network file server, overwriting any existing database.

2. Choose the **Network Workstation** installation option.

3. You are then prompted for the location of your database, dltools.mdb, during the DL Tools Network Server installation.

4. If this is a subsequent release of the software, the database is updated only once, after the first workstation install is complete. This action occurs when the software is accessed the next time. For example, if you are adding a workstation to your work environment, you perform a **Full** network workstation installation of the current version of DL Tools for that workstation. When the first user logs into DL Tools, the update runs. Subsequent installations will not update the database again.

5. Follow the prompts provided by the Setup program.

To Install Subsequent and Future Releases

For this version and all other future releases of DL Tools, you must do a **Custom** workstation install to ensure the database structure is updated.

Follow the instructions for "To Install the Software on a Network File Server Where the Software is Already Installed."

Instructions for Schools with Diskette Directories on a Server

To Install the Software Using Diskettes

If you want to copy the installation diskettes to a file server so you can do workstation installations from the server, follow these steps.

1. Create a disk directory for each diskette received. For example, if you receive four diskettes, then create four directories on the file server; if you receive six diskettes, then create six directories on the file server; if you receive nine diskettes, then create nine directories on the file server, etc.

   In the following six diskettes example, you would create a directory structure like this on your server.

   Example:

   \Install

   \Install\DISK1

   \Install\DISK2

   \Install\DISK3

   \Install\DISK4

   \Install\DISK5

   \Install\DISK6

   Note: The parent directory can have any name, but the subdirectories must be named DISK1, DISK2, etc.

2. Copy the contents of each disk into its corresponding directory on the server.

3. You can now install DL Tools from the file server by running **SETUP.exe** from the DISK1 directory on the server instead of carrying the diskettes to each workstation.

Install Log

Each time an installation is performed, an Install Log is created. The information tracked is the product and version number, type and nature of the install, drive/directory, date, and time of install. This file is named INSTALL.log and is located in your **C:\Program Files\EDESuite\Direct Loan Tools for Windows** directory (or the location you specified during the Installation Process).

Example:

\<APP NAME\>	**DL Tools for Windows**
\<VERSION\>	**1.X**
\<TYPE\>	**Stand Alone Full**
\<SUMMARY\>	**New release.**
\<TARGET\>	**C:\Program Files\EDESuite\DL Tools for Windows**
\<DATE\>	**02-02-2002**
\<TIME\>	**08:36:54**

Changing the Direct Loan Tools Database Path

You can change the DL Tools database path from within the DL Tools software.

Note to Windows NT Users: In order to change the Direct Loan Tools database path, you must have Windows NT administrator access rights.

To Change the Database Path

1. Open Direct Loan Tools and select **Help, System Information**.

2. Click the **Files Information** tab.

3. Click the **Registry** button.

    -   A Registry Viewer application displays with a split view.

    -   In the left window, you will see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.

    #### If you do not see the "Year12" label in the left window

    -   Single left click on the plus sign (**+**) next to EDESUITE.

    -   You will see a label indicating the software's year cycle under EDESUITE.

    #### If you do not see the "Express" label in the left window

    -   Single left click on the plus sign (**+**) next to Year12.

    -   You will see a label indicating the software's name.

    -   Highlight the name of the software.

4. On the right side of the split screen, find **Database** under the **Name** field, click it and select **Edit, Edit** from the main menu.

    -   A **Value** dialog box is displayed with two edit boxes.

    -   One box is labeled with **Name** (which is disabled) and the other box is labeled with **Value**.

5. Enter your new database path in the entry box next to **Value**, including the full path and database name (dltools.mdb) exactly as it appears in Windows Explorer, with upper and lower case letters.

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6. Press **Enter** or click **OK**.

7. Exit the Registry Viewer.

8. Click **OK** to exit the **System Information** dialog box.

9. Exit the DL Tools software.

The next time you start DL Tools, you connect to the new database.

You can confirm that you are connected to the new database by viewing the current database name and location in the status bar at the bottom right-hand corner of the DL Tools Window.

Uninstall

To uninstall DL Tools, click **Start, Programs** from your Windows Desktop and select EDESUITE to see an icon for the Uninstall utility.

Choosing Uninstall deletes all icons, the software's program group, all executable files, all DLLs, and the entire database for the version of DL Tools you have installed (except for the INSTALL.log file).

If DL Tools is installed on a LAN, the Uninstall utility deletes all DL Tools files (*.dll) and icons but not the database file on the network.

Note to Windows NT Users: In order to perform an uninstall, you must have the same or greater Windows NT access rights as the person who originally installed DL Tools.

To Uninstall DLTools

1. Double-click on the **Uninstall** icon. A prompt asks if you are sure that you want to completely remove the application and all of its components.

2. Click the **Yes** button.

3. Click **OK**.

DL Tools may also ask you additional questions during the uninstall process. Click either **Yes** or **No** in response to these questions.

Warning: Do not uninstall the software if you are performing a Custom installation.

Getting Started

Logging In for the First Time

The first time you start DL Tools, you will need to become familiar with the Startup Information box, how to enter a user ID and password, how to create a new password, and how to establish your school as the assumed school used by DL Tools. Instructions for all of these tasks are provided within this section.

Startup Information Box

The first time you launch DL Tools, you see the **Startup Information** box. This box displays various messages, warnings, or errors.

To View and Close the Startup Information Box

1. The first time you access DL Tools, the **Startup Information** box is displayed.

2. Review the messages, warnings, or errors displayed.

3. Click **Close** or press **Enter** to close the **Startup Information** box.

User ID and Password

Each time you start DL Tools, you must enter a valid user ID and password.

DL Tools requires passwords for system security.

To Access DL Tools for the First Time and Establish Your New Password

1. Type your user ID. If this is your first time logging in, your user ID is **SYSADMIN**. SYSADMIN is the default user ID.

2. Type your password. If this is your first time to log in, your password is **SYSADMIN**. SYSADMIN is the default password.

3. If this is your first time logging in, type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.

   - Up to eight (8) alphanumeric characters may be entered.

   - The Password and Verify Password must be the same.

4. Type the **new password** again in the Verify Password field.

5. Click **OK** to log in.

Resetting Your User ID and Password

If you have forgotten your password, you can have your DL Tools for Windows administrator give you a new one using the User Security function from the menu bar.

To Access the User Security Function

1. Select **Tools** on the menu bar.

2. Then, select **Setup, Global, Security Users**.

If you're the DL Tools administrator and you've forgotten your password, call CPS/WAN Technical Support at 800/330-5947 for help with resetting the default user ID and password to SYSADMIN.

All DL Tools users, especially DL Tools administrators, should record their user IDs and passwords and keep them in a safe place where they will be remembered.

Getting Help

Basics

There are a number of ways to get help in the installation of DL Tools:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use DL Tools online Help.
- Technical Support.

These approaches are described below.

Review Installation Instructions

If you have problems installing DL Tools, first review the installation instructions again.

Try the installation process again (make sure you include ALL steps).

If you are still having difficulty, call CPS/WAN Technical Support at 800/330-5947 or e-mail at cpswan@ncs.com.

Become Familiar with Your PC

Once you have successfully completed the DL Tools installation, click **System Information** from the Help menu.

Compare this information to the required configurations listed at the beginning of this section.

You may need to upgrade your equipment or your system's configuration.

Contact Your System Administrator

Your school or organization may have additional instructions for your PC. For example, you may get an error if you are trying to install the software to a drive for which you do not have access.

Use Direct Loan Tools Online Help

Instead of a paper user's guide, DL Tools has online Help.

General help is available from the menu bar and field help is available by pressing the F1 key.

See the topic "Using Help" in the online Help for more information.

You can access online Help by any of the following methods:

- From the **Help** menu, choose a help command.
- Choose the **Help** button available in many dialog boxes.
- Use the keyboard to select an item on a menu, and then press **F1** to see a description of the item.
- Select a dialog box option or command and then press **F1**, or click the **Help** button to move directly to an explanation of the option.
- Use the **Context Help Toolbar** button to obtain help on menu options and other Toolbars.

Technical Support

SFA Technical Support

For SFA technical support, post an e-mail (including your telephone number) with your question to:

www.ed.gov/offices/OSFAP/sfatech/listserv.html

Department staff or contractors for the system about which you have a question will work on a response.

Note: You must subscribe to SFATECH in order to send and receive messages from the list.

CPS/WAN Technical Support

If you need technical support, call CPS/WAN Technical Support:

800/330-5947

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

You may also send your inquiries via the Internet to CPS/WAN Technical Support:

cpswan@ncs.com

Guidelines for Calling Technical Support

When you call CPS/WAN Technical Support at 800/330-5947, you must be at your PC and prepared to provide the following information:

- Your TG ID.

- The version of the software you are using (under Help/About DL Tools for Windows...).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, type of memory management being used).

- The exact wording of any error messages you received, as they appeared on your screen.

- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.

- A description of any resolution steps you took prior to calling.

CPS/WAN Voice Response System

The CPS/WAN Voice Response System has phone routing to assist you in designated areas. When you call 800/330-5947, you are asked to enter the last 5 digits of your TG ID.

Example:

For **TG50001,** enter **50001**

For **TG60001,** enter **60001**